

[View in browser](#)

FinancialPlanning



Wealthtech Weekly

June 19, 2025

**By Rob Burgess**

Reporter

According to a recent Morningstar study, clients don't mind, and may even expect, advisors to use AI to automate marketing messages. But, if they figure out you're not writing direct emails to them, they value you less. [A lot less.](#)

(I also made [my first YouTube Shorts video](#) about this. [Like and subscribe!](#))

Do you use AI for client communications? Let me know — robert.burgess@arizent.com. (But don't use AI!)

I hope you'll check out the article, along with the rest of this week's stories.

As always, thank you for reading. Talk to you next Thursday!

Connect with Rob:

**FinancialPlanning
ADVISE | AI**
October 28-29, 2025 | Wynn Las Vegas, NV

**The only wealth management
event 100% focused on AI**

Michael Kitces
Chief Financial Planning nerd
Kitces.com

#AdviseAI

REGISTER TODAY

TOP STORIES

TECHNOLOGY

Using AI to write that client email? Think twice.



A Morningstar study found that clients who get AI-generated emails think their advisors should take a pay cut.

- **How switching broker-dealers led to a tech rethink: Show Me Your Stack**

Ryan Salah, of Capital Financial Partners, said his RIA recently decided to add tax planning software into the mix.

- **New tools for donor-advised funds tap the social aspect of giving**

Daffy's campaign toolkit upgrade aims to boost donations via social functions: "People are inspired to give when they see others step up," said CEO Adam Nash.

- **CFP Board taking deeper dive on AI guidance in financial planning**

In February, the organization released its "Generative AI Ethics Guide," which may be updated based on the group's findings.

- **FPA's new online tool aims to help advisors boost behavioral skills**

The self-assessment model is targeted at developing advisors' skills and encouraging client connections across all career stages.

Read the latest in Wealthtech

PARTNER INSIGHTS FROM EMONEY

Asking the right questions is at the heart of every meaningful financial conversation

How do you know what to ask and when? This webinar will guide financial professionals through a three-part journey.

You're receiving this email because you signed up for Editorial emails from Financial Planning.

To update the emails you want to receive, or to unsubscribe from our mailing list, please visit our [Email Preference Center](#).

arizent 

Arizent

360 Madison Avenue, 8th Floor
New York, NY 10017

[About](#) | [Subscriptions](#) | [Contact](#) | [Privacy Policy](#)

Have questions or concerns? [Contact Support](#)

Follow us in real time:

